Navigate Strategic Care 23.2.0 Release Notes

The Navigate Strategic Care 23.2.0 release brings Appointment Feedback to the Navigate Staff platform. It also introduces the V3 Reports, though legacy Navigate Reports are still available. On the Recruitment Management side, there are improvements to the Prospects Report, a new Quick Search for prospects, the ability to mass update prospect status via reports and lists and other changes. There have also been fixes across the platform.

The release is tentatively scheduled to be released to Training environments on September 7th, 2023. It will be released to PROD A on September 12th, and PROD B on September 18th, 2023.

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Appointment Feedback

Creating Appointment Feedback Templates

Navigate 23.2.0 introduces the ability to request feedback on appointments from students. This feature has two main parts: creating Appointment Feedback templates for Care Units and what the student sees and fills out after an appointment.

To access Appointment Feedback features, users need the following permissions, both in the Care Unit Permissions & Data Access drawer:

- **Create, Edit, and Delete Appointment Feedback Templates:** needed to access Appointment Feedback templates in Care Units.
- **View Appointment Feedback Responses:** needed to see individual student responses in the Appointment Feedback reports. Note users also need permission to access the reports.

To create or edit an Appointment Feedback template, open a Care Unit, and go to the **Appointment Feedback Template** tab.

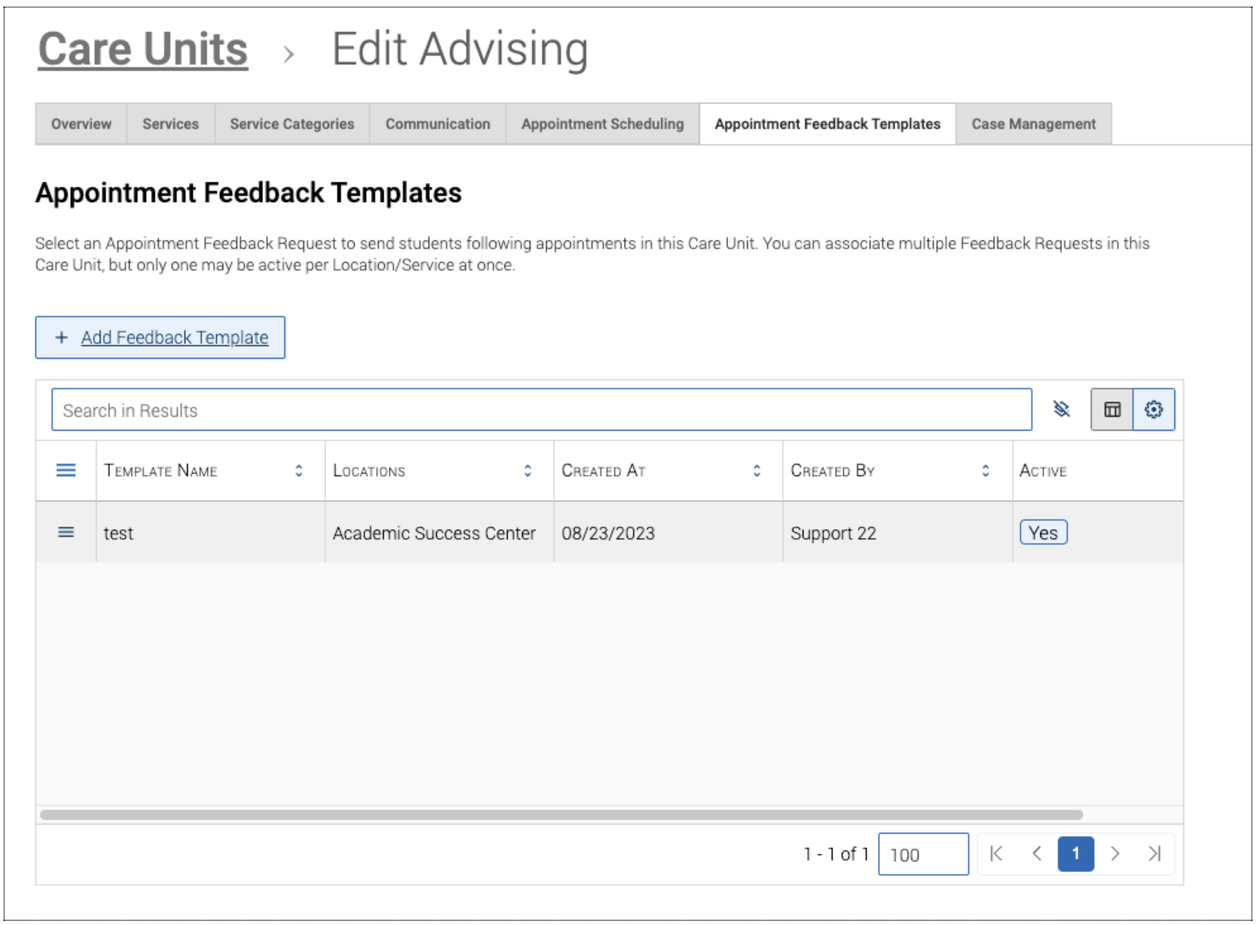


Figure 1. Appointment Feedback Template tab

Users can create multiple Appointment Feedback templates, but users can have only one active template per Location/Service combination.

When creating an Appointment Feedback template, users have several criteria to enter.

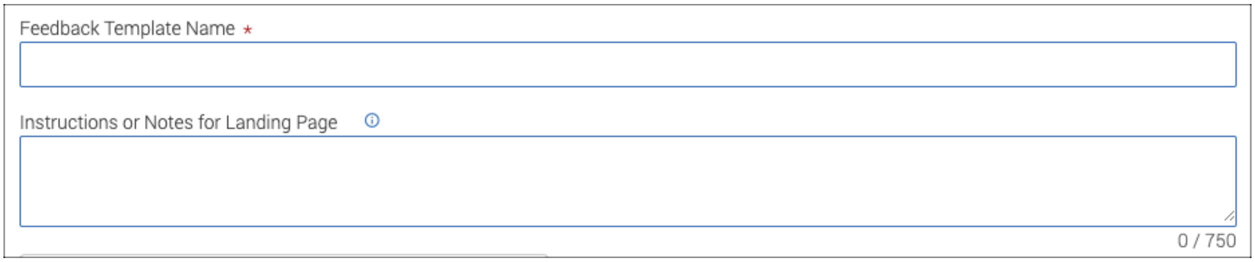


Figure 2. Basic fields for a Feedback template

Feedback Template Name is the internal template name users see on the Appointment Feedback Template tab. Choose a memorable name for clarity, especially if there will be similar names for the feedback templates. **Instructions or Notes for Landing Page** is information students see when they click the **Give Feedback** link in the request.

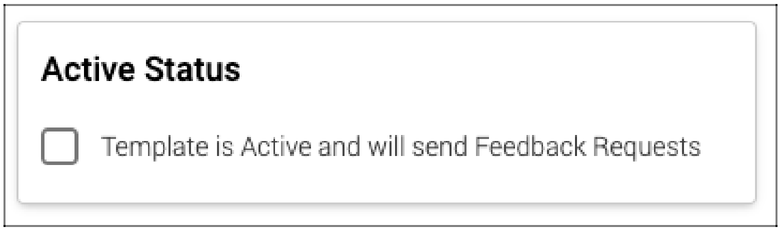


Figure 3. Status of the appointment feedback template

Check the **Template is Active** box to enable your Appointment Feedback template. It will then send requests (once the template is saved).

Next, you will select the Location and Service combination for your feedback template by selecting the **Add Location/Service** button. A panel opens.

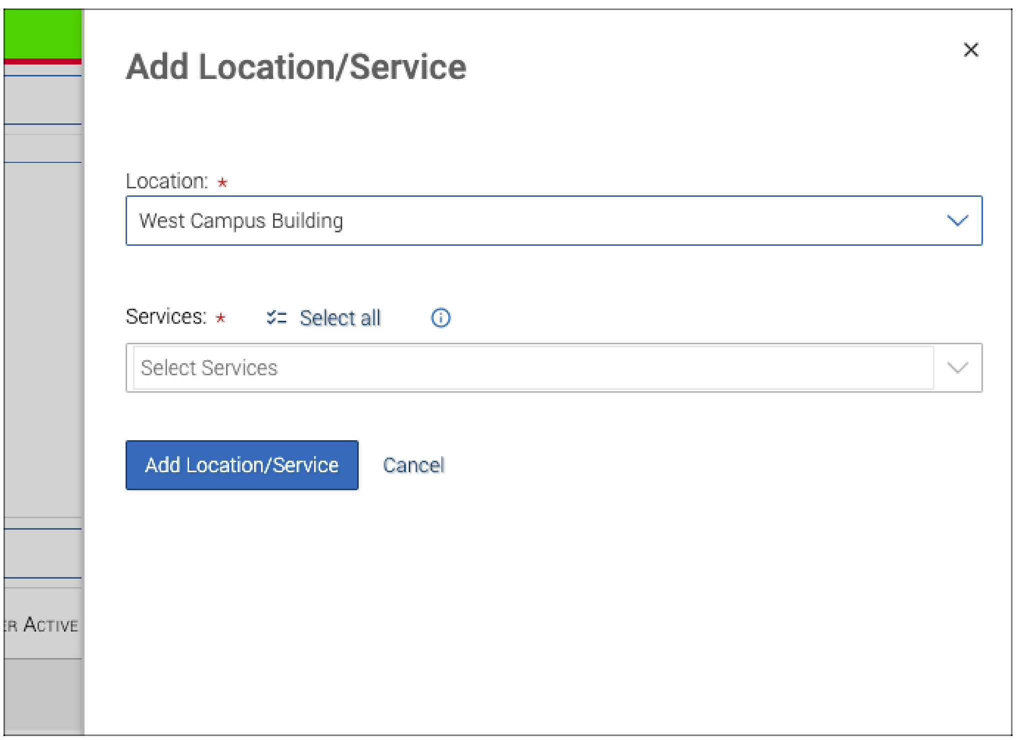


Figure 4. Add Location/Service panel for appointment feedback

Select the Location and then the Services the template is for. You can select more than one service; however, that service then cannot be used in another template for the location. If you add a service being used in another active template, that shows in the *Used in Other Active Template* column on the main Add Feedback Template page.

Next, choose the **Feedback Basis**. This sets when the feedback request is sent to the student. Users can select either *Send after Appointment Summary created*, which will send a request after staff creates the Appointment Summary for both scheduled appointments and drop-ins OR *Send after Scheduled Appointment end time*, which sends to any student that day with a scheduled appointment in Navigate, which can include late no-shows. If you select to send after the scheduled appointment end time, you must also select the number of hours after the appointment ends to send feedback.

Important. Navigate only sends feedback requests between 8 AM and 8 PM in your school's time zone.

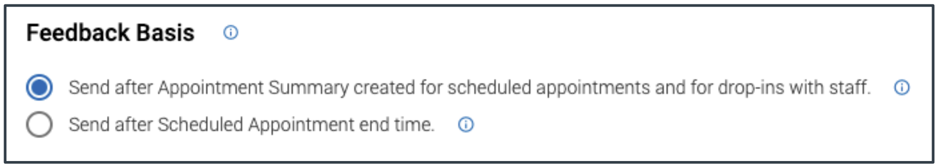


Figure 5. Feedback Basis options

Next, select how the student will be notified. Your options are email and/or SMS. Both methods can be selected at once.

Figure 6. Notification method for Appointment Feedback template

Finally, users add up to five questions for students. Start by clicking the **Add Question** button. The Add/Edit Question panel opens.

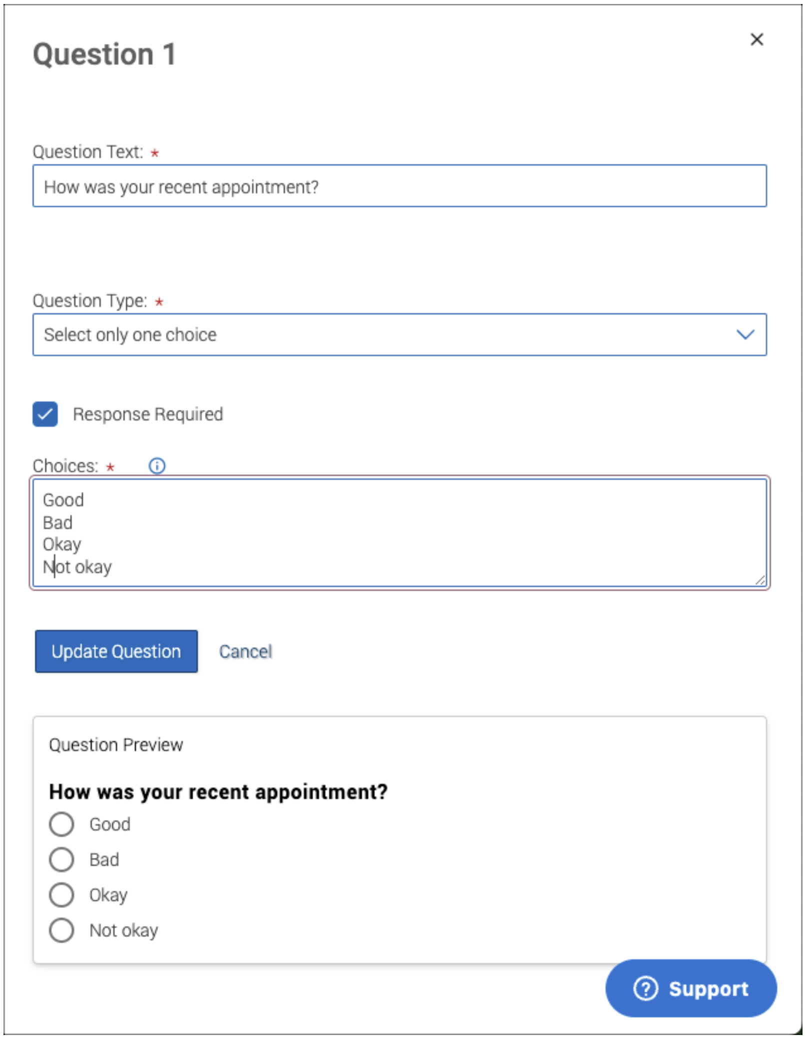


Figure 7. Add/Edit Question panel

Enter your question, the type of question (nine options), if a response is required, and any text your question type requires you to enter. At the bottom of the panel, users see a preview of the question.

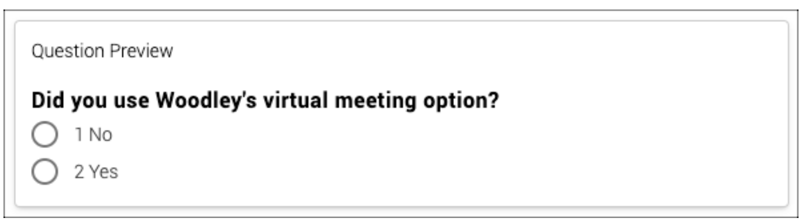


Figure 8. Question Preview for Appointment Feedback

After setting your options and questions, press **Save** to create or update your Appointment Feedback template. Once a template has been sent, you cannot edit questions or their ordering for reporting reasons.

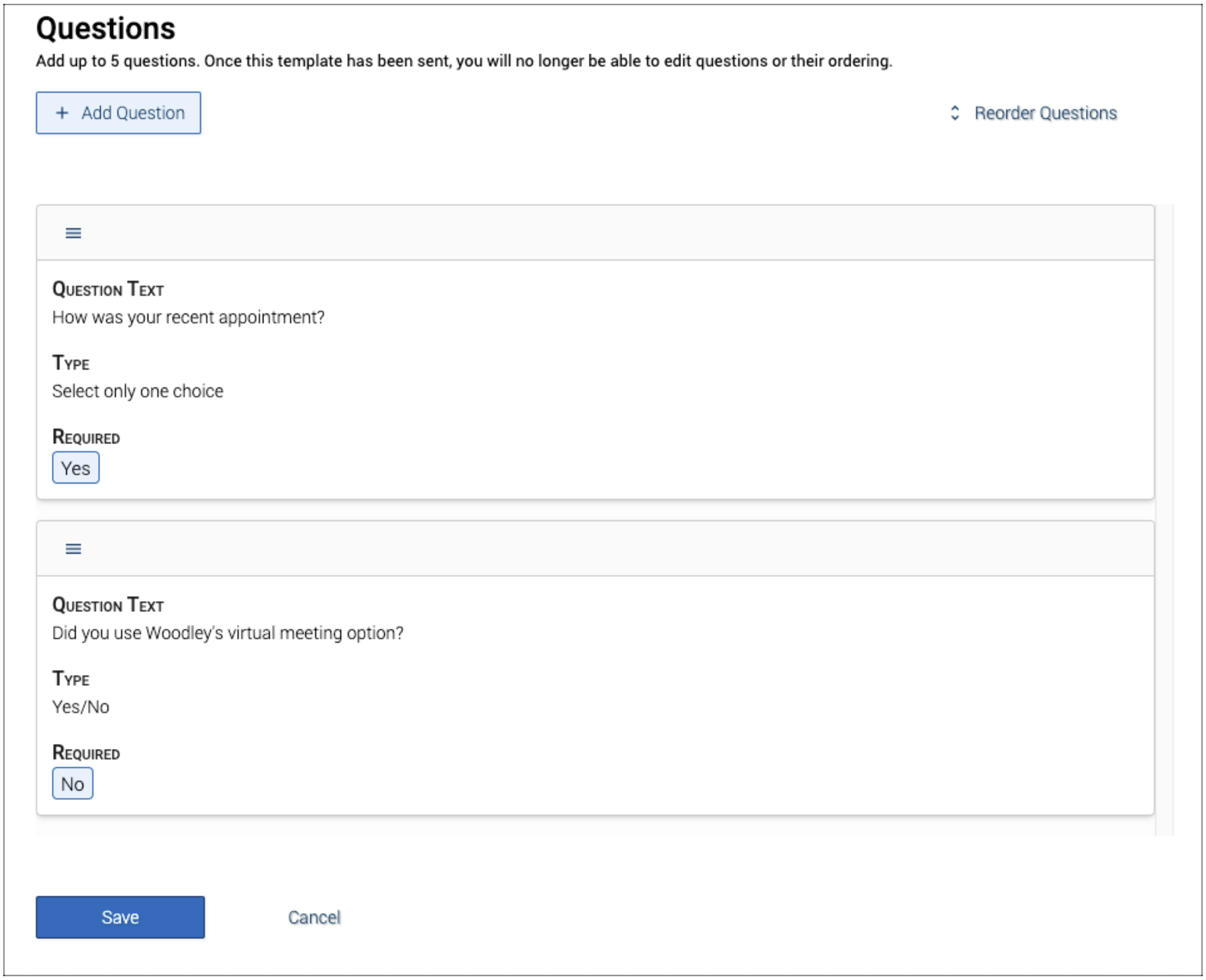


Figure 9. Finished questions and Save button in an Appointment Feedback template

After creating an Appointment Feedback template, it will be listed with other templates in the Care Unit tab.

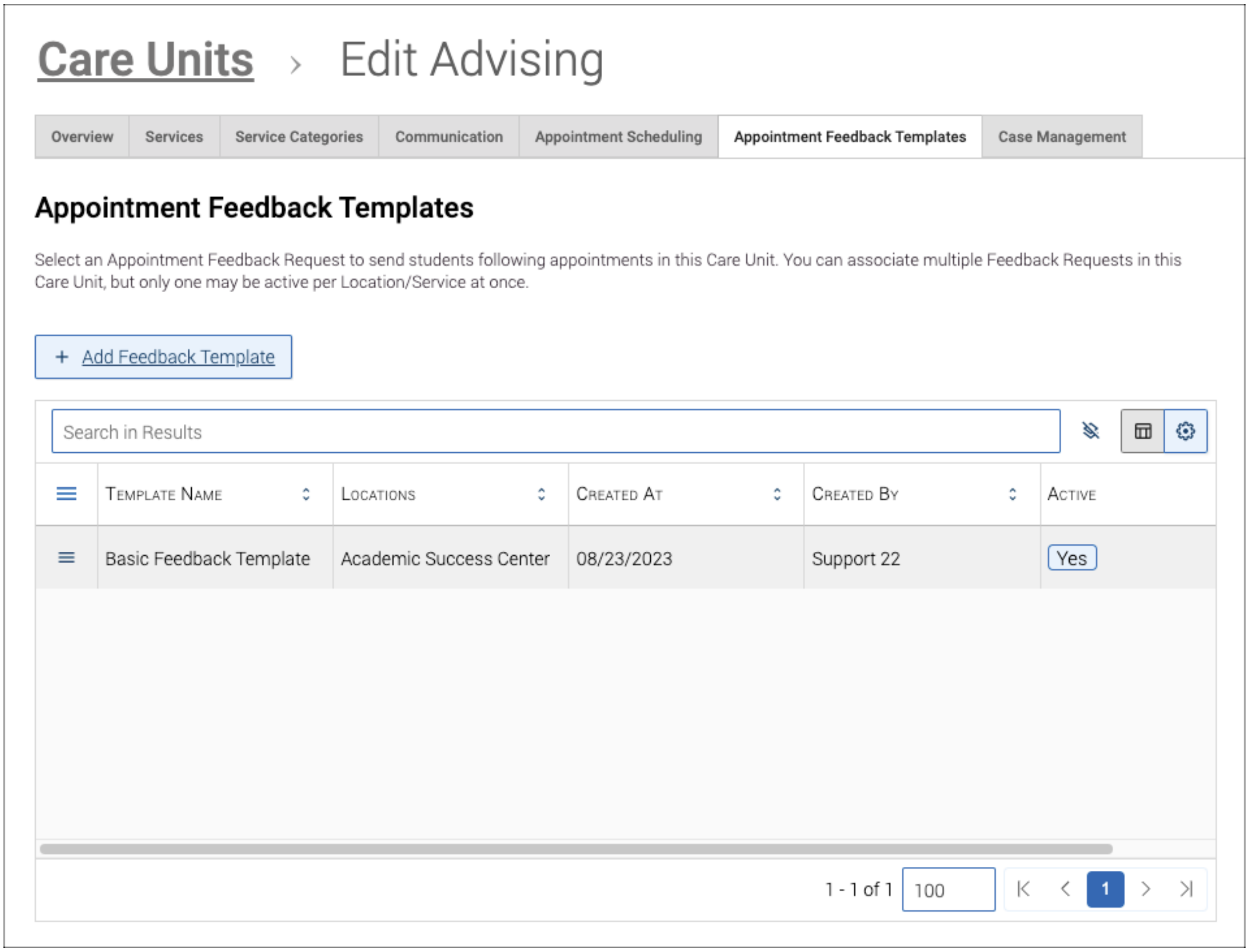


Figure 10. List of feedback templates for a Care Unit

Request for Appointment Feedback for Students

After creating at least one template, students with appointments in the Location/Service combo that meet the feedback basis will start getting Appointment Feedback emails. For example, let's say there's a template where the Location is Freshman Advising Center and the Service is Registration Help. In this example, a feedback email generates 24 hours after the end of the scheduled appointment. A student getting registration help at the Freshman Advising Center should then receive an email 24 hours later between 8 AM and 8 PM in your institution's time zone.

An example of the student email is displayed below.

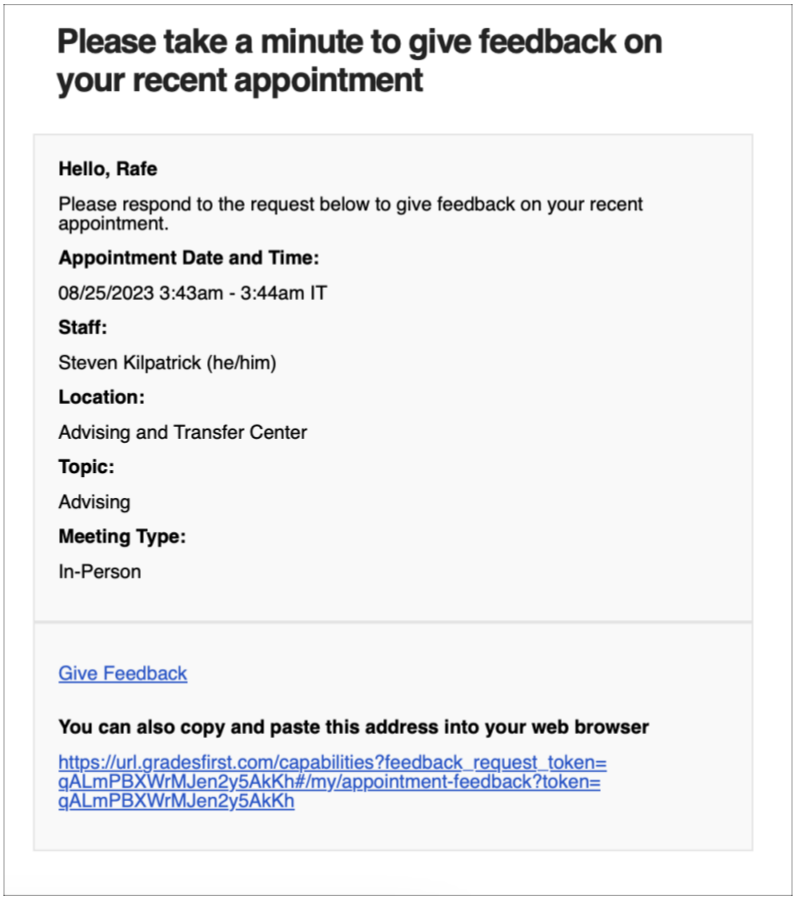


Figure 11. Email to student requesting Appointment Feedback

When the student clicks the *Give Feedback* link, they are taken to a landing page with the instructions entered for the template and details about the appointment.

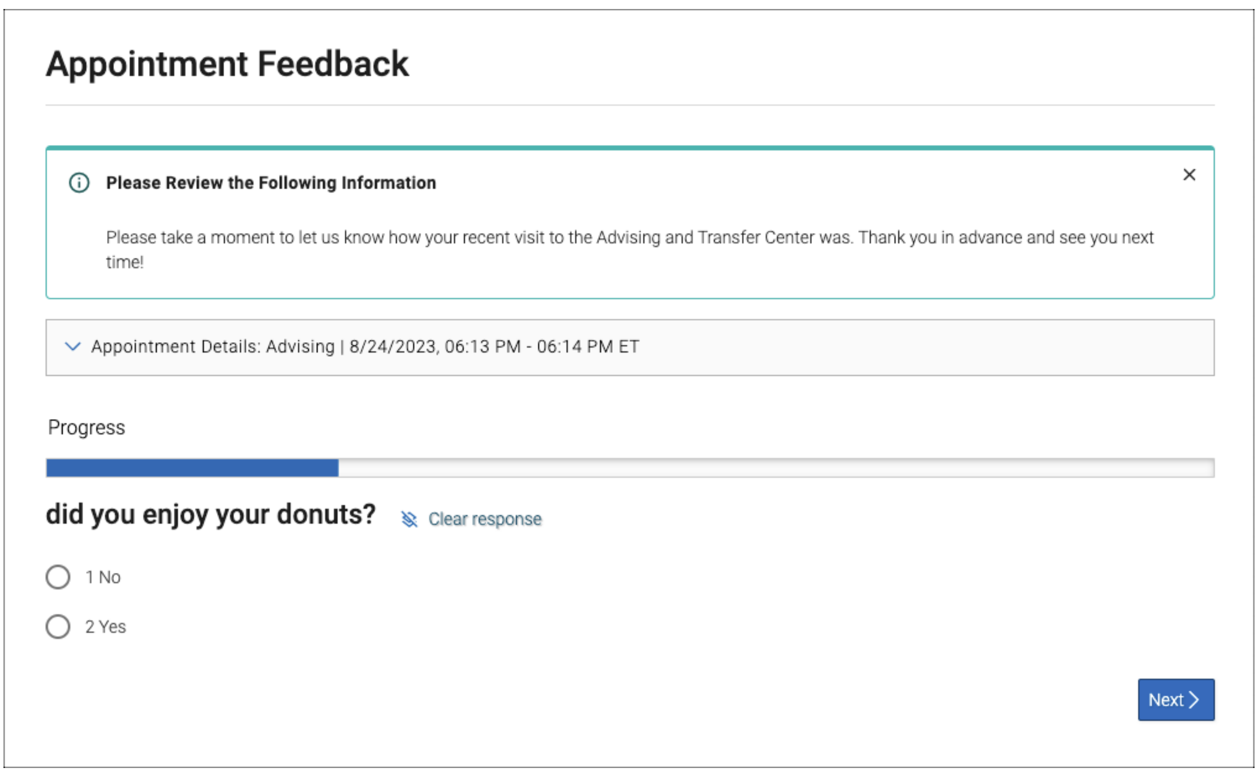


Figure 12. Appointment Feedback form for a student

Students click **Next** to move to the next question; however, any required questions will not let the student advance without making a response.

Figure 13. Example of a required Appointment Feedback question and error message

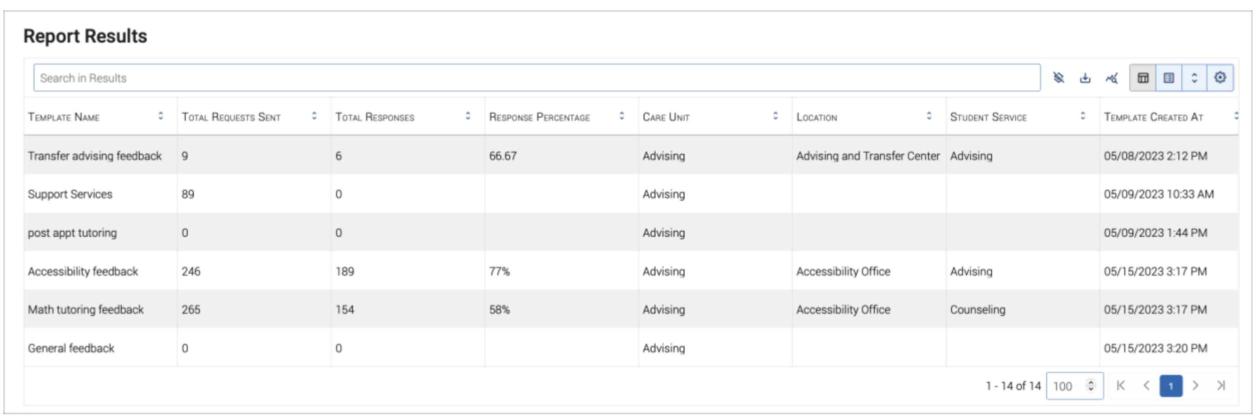
Students will click **Submit** to send the form when they reach the last question. Until they do, they can move back to previous questions and change their answer or clear responses.

Appointment Feedback Reports

There are two Appointment Feedback reports included in V3 Navigate Reports: Appointment Feedback Metrics and Appointment Feedback Responses. These are the main way to track responses from appointment feedback in the Navigate platform. Users need the **View Appointment Feedback Responses Report** and the **View Appointment Feedback Metrics Report** to access the reports and **View Appointment Feedback Responses** to see student responses in the Appointment Feedback Responses report.

Appointment Feedback Metrics

The Appointment Feedback Metrics report covers overall information about how your Appointment Feedback Templates are working. It shows how many feedback requests are being sent by a template, how many responses the template has gotten, the response percentage, and information about the template itself.



Report Results

Search in Results

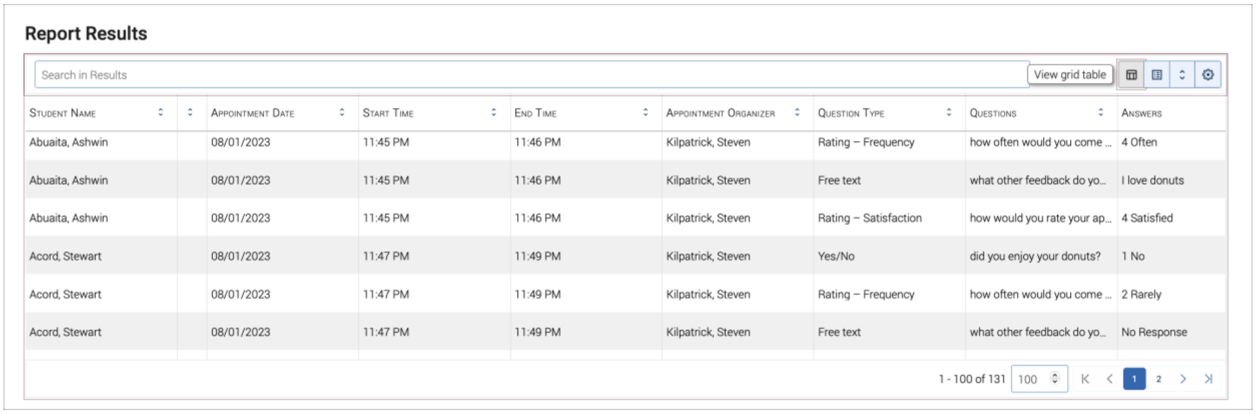
Template Name	Total Requests Sent	Total Responses	Response Percentage	Care Unit	Location	Student Service	Template Created At
Transfer advising feedback	9	6	66.67	Advising	Advising and Transfer Center	Advising	05/08/2023 2:12 PM
Support Services	89	0		Advising			05/09/2023 10:33 AM
post appt tutoring	0	0		Advising			05/09/2023 1:44 PM
Accessibility feedback	246	189	77%	Advising	Accessibility Office	Advising	05/15/2023 3:17 PM
Math tutoring feedback	265	154	58%	Advising	Accessibility Office	Counseling	05/15/2023 3:17 PM
General feedback	0	0		Advising			05/15/2023 3:20 PM

1 - 14 of 14 100 1

Figure 14. Appointment Feedback Metrics report results

Appointment Feedback Responses

The Appointment Feedback Responses report shows the responses that the students give to the feedback forms. It shows each question in the form, the question type, and the answers.



Report Results

Student Name		Appointment Date	Start Time	End Time	Appointment Organizer	Question Type	Questions	Answers
Abuaita, Ashwin		08/01/2023	11:45 PM	11:46 PM	Kilpatrick, Steven	Rating – Frequency	how often would you come ...	4 Often
Abuaita, Ashwin		08/01/2023	11:45 PM	11:46 PM	Kilpatrick, Steven	Free text	what other feedback do yo...	I love donuts
Abuaita, Ashwin		08/01/2023	11:45 PM	11:46 PM	Kilpatrick, Steven	Rating – Satisfaction	how would you rate your ap...	4 Satisfied
Acord, Stewart		08/01/2023	11:47 PM	11:49 PM	Kilpatrick, Steven	Yes/No	did you enjoy your donuts?	1 No
Acord, Stewart		08/01/2023	11:47 PM	11:49 PM	Kilpatrick, Steven	Rating – Frequency	how often would you come ...	2 Rarely
Acord, Stewart		08/01/2023	11:47 PM	11:49 PM	Kilpatrick, Steven	Free text	what other feedback do yo...	No Response

Figure 15. Appointment Feedback Responses report results

Like other V3 reports, the results of the Appointment Feedback reports can be put into a pivot table, saved, and scheduled.

V3 Reports

Introducing V3 Navigate Reports

The other major feature of the Navigate 23.2.0 release are our V3 Navigate Reports. These reports include versions of all existing legacy reports except for the Assignments report (though institutions bringing in assignments via their LMS can user Advanced Search to get this information) as well as four new reports tied to Appointment Feedback and next-generation Academic Planning. For partners who have Recruitment Management, the V3 reporting framework is the same as Recruitment Management's existing reports.

No new permissions are needed to access V3 reports; all current legacy report permissions will apply to the V3 report equivalent.

The V3 Navigate Reports now appear when users select the Reporting icon. However, users can still access the legacy reports until they are sunset. The date for the legacy reports sunset will be announced in the future.

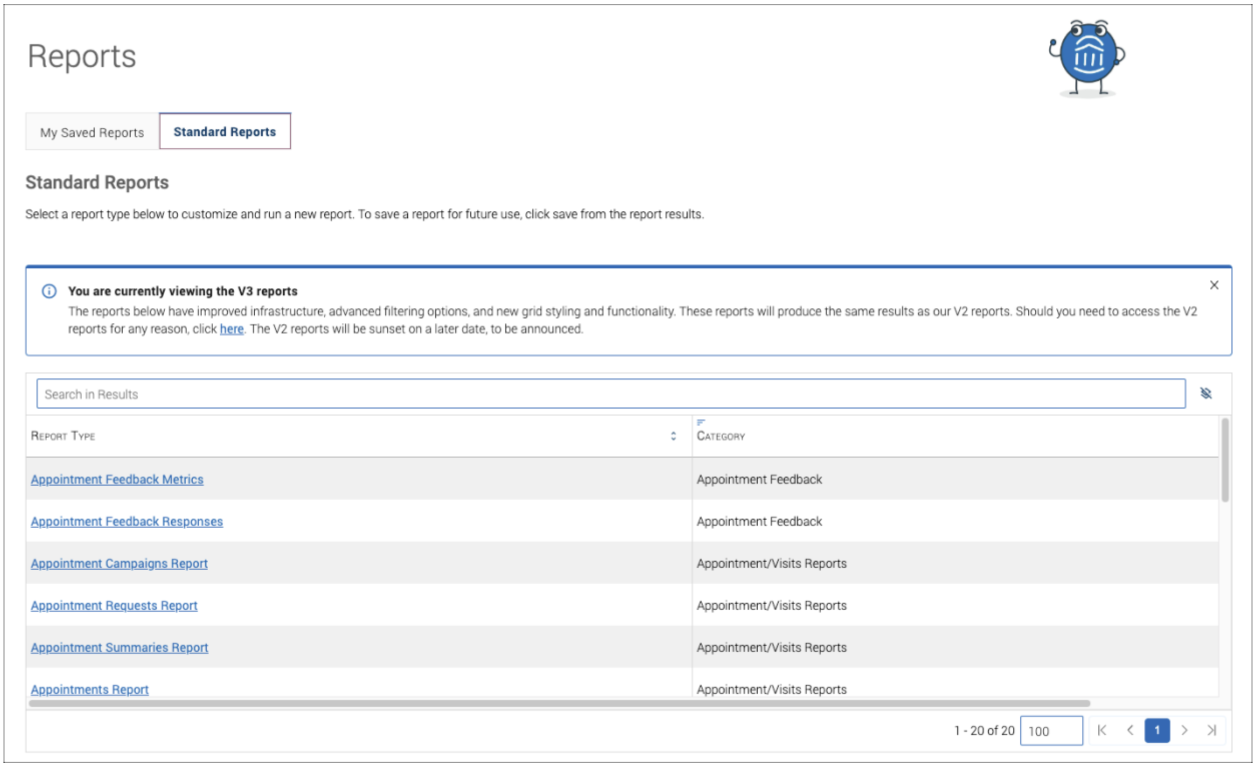


Figure 16. Navigate V3 Reports list

We have created an extensive Help Center article that covers information about all V3 reports. It explains how to generate a report, how to take action on the report, as well as saving and exporting the reports.

Some of the major changes and benefits of the V3 reports include:

New Reports

There are four new reports: Appointment Feedback Metrics, Appointment Feedback Responses, Academic Plan Utilization, and Student Compliance to Advisor Plan. The first two reports are tied to the new Appointment Feedback feature. The other two reports are for partners who use next-generation Academic Planner and provide much the same data as Academic Planning Analytics provides to legacy Academic Planner partners.

To access these reports, you need the following permissions: **View Advisor Plan Compliance Report, View Academic Plan Utilization Report, View Appointment Feedback Responses Report,** and **View Appointment Feedback Metrics Report**.

Two more reports will be available once Navigate Student releases Survey Campaigns in the 23.10 release in late September or early October.

More Powerful Filter Parameters

The biggest change most users will notice when creating a V3 report is how the filters look as well as changes to how they can be applied. Instead of the previous method of creating an Advanced Search before running the report, users will choose the fields to search on, but with more functions to search on as well as broader filter logic.

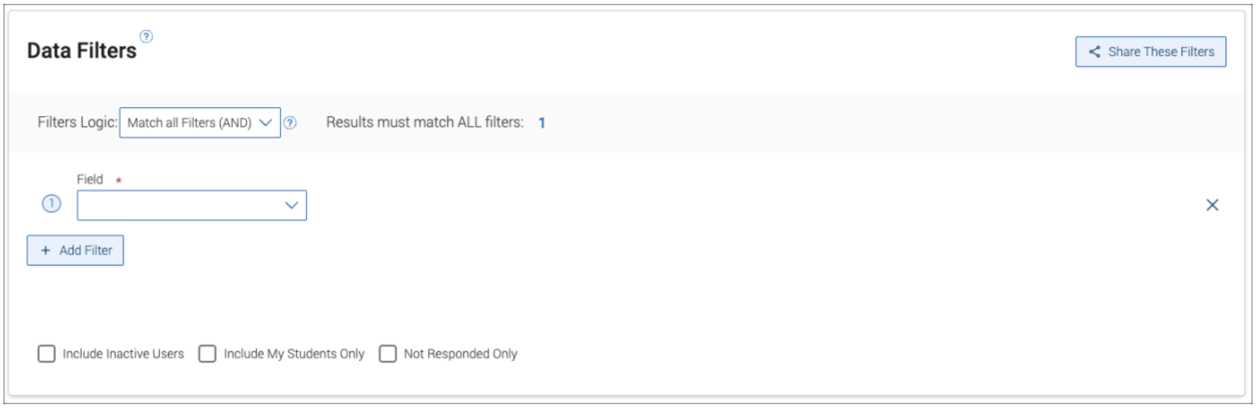


Figure 17. V3 reports data filters when blank

At the top of the Data Filters section, users see the Filters Logic. This determines how your criteria are interpreted by the platform. Explanations of the filter's logic are below.

Option	Description
Match all Filters (AND)	Use the match all filters option to create a logical condition that requires all specified criteria to be true for a record to be included in the report results. AND logic will narrow your results.
Match any Filters (OR)	Use the match any filters option to a logical operator that connects multiple conditions, where at least one condition must be true for a record to be included in the report results. OR logic will broaden your results.
Advanced (AND/OR)	Use Advanced to create more complex logic when creating a report to specify conditions that must be met. "AND" requires all conditions to be true, while "OR" requires at least one condition to be true.

Next, users select a field. Fields are specific to the report chosen.

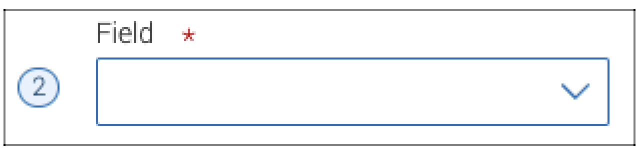


Figure 18. Blank field for a Navigate V3 report

A conditions field appears. Users have many more options for conditions than in legacy reports, allowing for more complicated queries.

Note. Conditions displayed vary by data type.

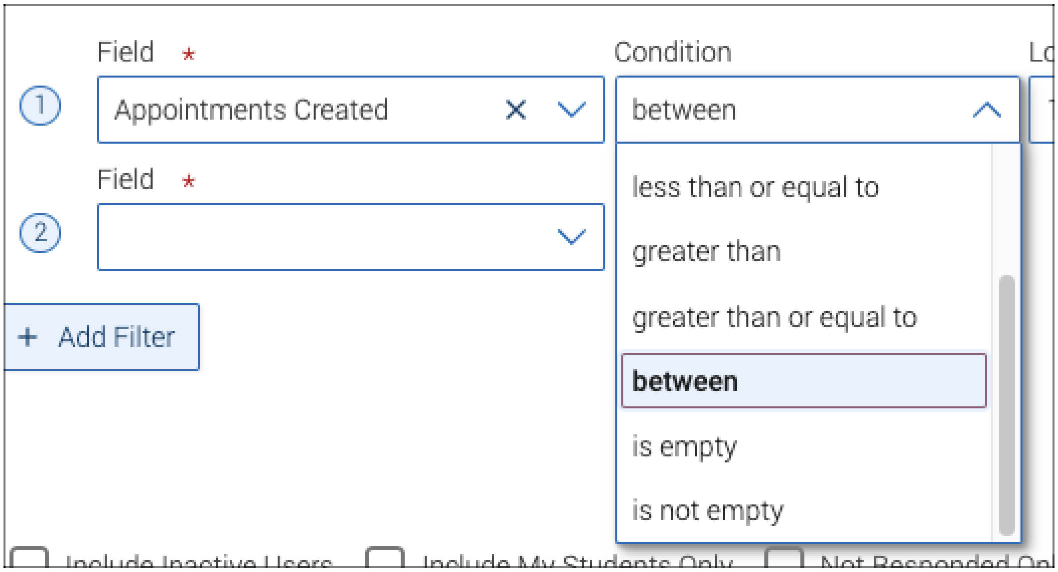


Figure 19. Conditions field dropdown

After choosing a Condition, various value fields may appear. These are unique to the Condition selected; for example, choosing *between* will open a *Low* and *High* field.

Figure 20. A filter with all fields and values chosen for V3 reports

If after adding the first filter, users want to add another, select the **Add Filter** button and repeat this process.

Once filters are set, you may optionally select any of the checkboxes at the bottom of the Data Filters section. These are like the previous reports overall; for example, you select *Include Inactive Users* and *Include My Students Only* here. However, some checkboxes are unique to the report, as shown in the example in figure 21.

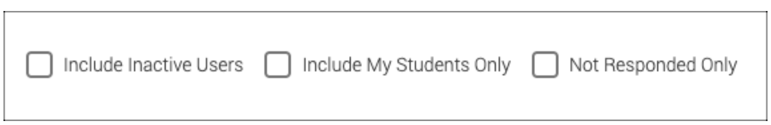


Figure 21. Report checkboxes users can filter by

To run the report with your selected filters, select **Run Report**.

Sharing Report Filters

Users can share the filters they select for a report by choosing the **Share These Filters** button.

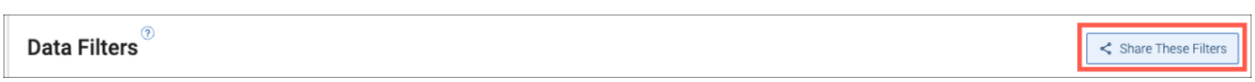


Figure 22. Share These Filters button on a V3 report

Clicking the button copies a URL to the user's clipboard. The user can then paste the URL and send it to another user. If the user has the correct permissions to see the report AND filters chosen, clicking the URL opens the Report page with pre-filled filters. If they do not have the correct permissions, users receive a Permission Denied notification.

Working with Report Results

Once users run a report, the results appear in a table much like in legacy reports; however, there are some changes. First, if a report has more than 20,000 results, it must be exported and will not display in the Navigate Reporting interface.

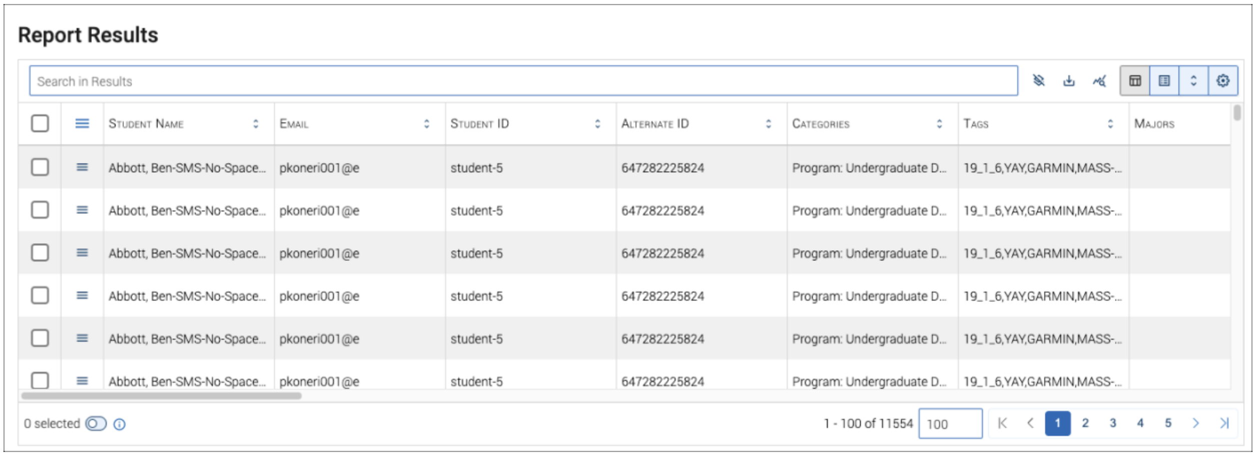


Figure 23. Report results for an Appointment Campaigns report

Next, users can search in the results using the search bar at the top of the results.

There are new icons that let users adjust their reports. The icons and what they do are explained in the table below.

Icon	Description	Behavior
	Clear all sorts and filters	When selected, the sorts in the grid and the filters in the search results are cleared. Grid settings are not applied.
	Export	When selected, the grid is exported into a CSV file. Grid settings (if any) are applied. Note you must export a grid if it has more than 20,000 results.
	Load grid into a pivot table	When selected, the grid opens in a pivot table. See below for more information about pivot tables and charts.
	View grid table	When selected, the grid search results display.
	View column manager	When selected, you can adjust the column order by dragging or clicking each item up or down the list. Use the checkboxes to toggle column visibility. Use the caret symbol to move an item up or down the list by one position or move an item to the top or bottom of the list. Any changes will revert to the default order when you exit this page.
	View sort manager	When selected, you can create a multi-column sort. If the sort buttons are used on the table, then the multi-column sort is reset, and sorting occurs by only one column. Any changes will revert to the default order when you exit this page.

	View grid settings	When selected, you can configure how the grid renders and exports data. Any changes will revert to the default order when you exit this page.

Users can still take mass action on results by selecting the box in front of the row and clicking the **Actions** button.

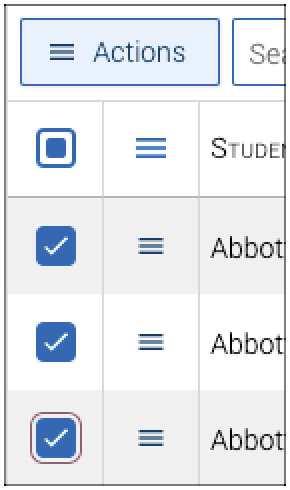


Figure 24. Actions button in V3 report results

The actions are the same as in legacy reports, e.g. Tag, Note, Send Message to Student.

Additionally, by clicking the icon, users can perform actions on an individual student.

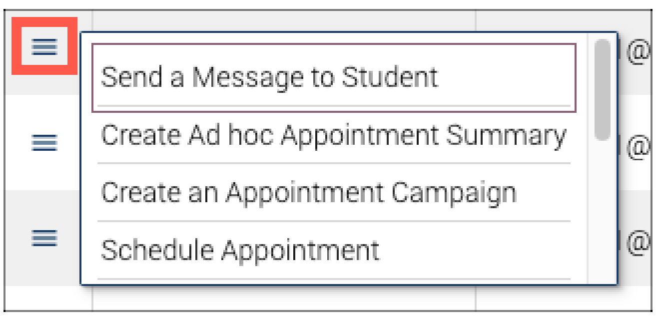


Figure 25. Actions menu for an individual student in V3 report results

If you select one or more rows, you can click the toggle at the bottom of the table to only see the rows you chose. Select **Deselect Filtered** to clear your selections.

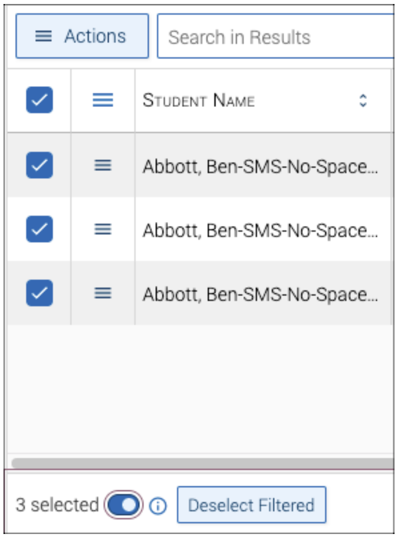
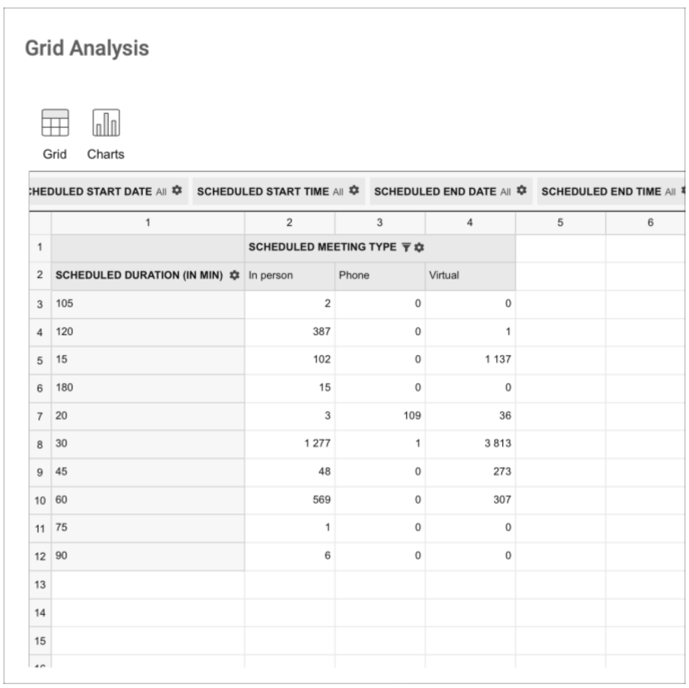


Figure 26. Showing only selected rows in V3 report results

Pivot Tables and Charts

A third-party tool, Flexmonster, is integrated into V3 reports and allows users to create data visualizations and pivot tables within Navigate. Once report results have generated, click on the icon noted above to load data into a pivot table.



	1	2	3	4	5	6
1		SCHEDULED MEETING TYPE				
2	SCHEDULED DURATION (IN MIN)	In person	Phone	Virtual		
3	105	2	0	0		
4	120	387	0	1		
5	15	102	0	1 137		
6	180	15	0	0		
7	20	3	109	36		
8	30	1 277	1	3 813		
9	45	48	0	273		
10	60	569	0	307		
11	75	1	0	0		
12	90	6	0	0		
13						
14						
15						

Figure 27. Example of a pivot table in the V3 reports

The selection of filters and arrangement of fields in a pivot table is done in the *Fields* area of the tool. Additional formatting and display options are also available. Visual displays of the data can also be generated by selecting a specific chart type from the *Charts* area of the tool.

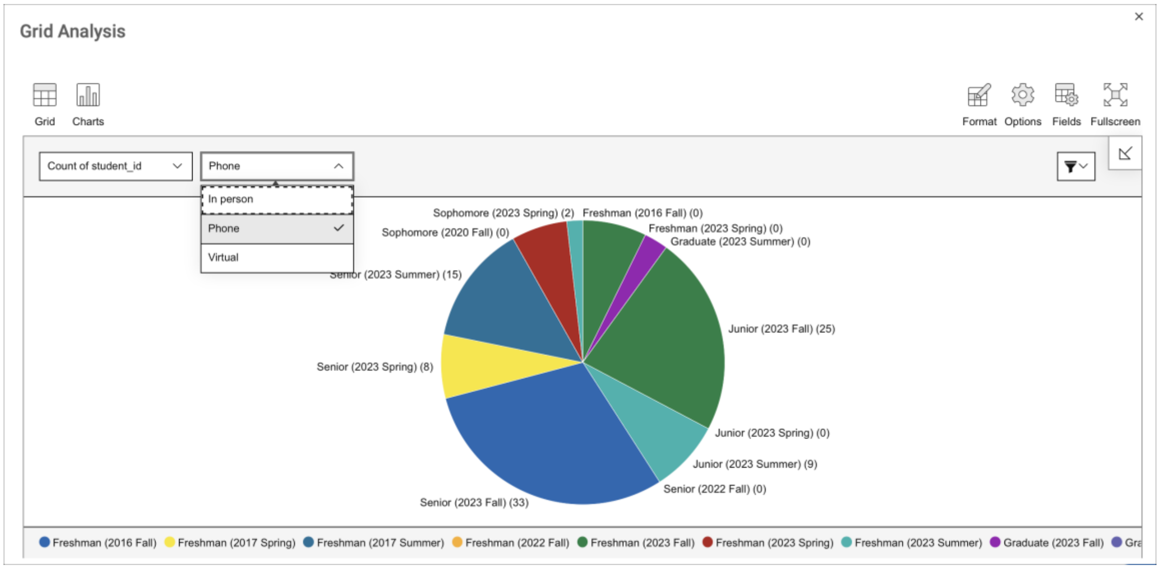


Figure 28. Example of data visualization in V3 Navigate reports

Grid Settings

Several configurations are available on the Grid Settings page. Information about these options is listed below.

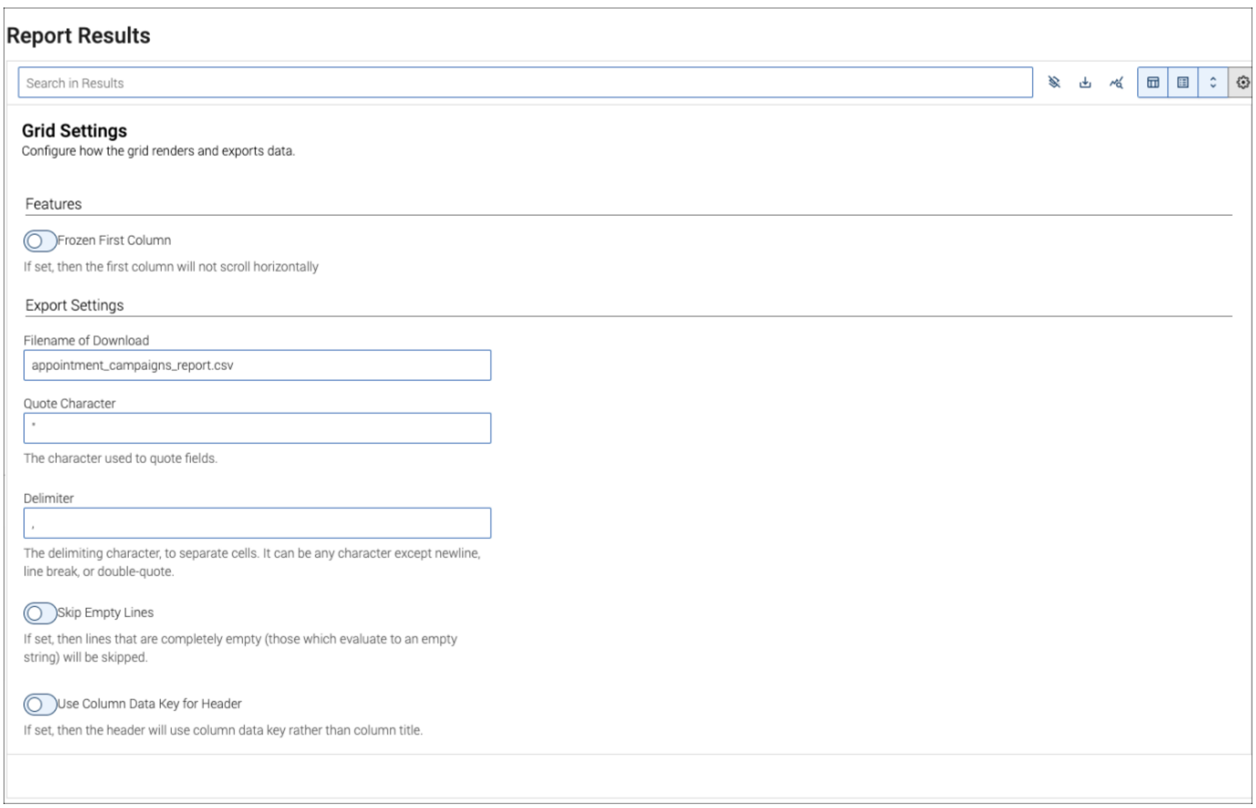


Figure 29. Grid settings configurations for V3 report results

Configurations

- **Frozen First Column:** If selected, the first column of the grid will not scroll horizontally.
- **Export Settings**
  - *Filename of Download:* Enter the name you would like displayed when the grid is exported.
  - *Quote Character:* Enter the character used to quote fields.

  – *Delimiter:* Enter the delimiting character to separate cells. It can be any character except newline, line break, or double quote.

- **Skip Empty Lines:** If selected, then the lines that are completely empty (those which evaluate to an empty string) will be skipped.
- **Use Column Data Key for Header:** If selected, then the header will use the column data key rather than the column title.

Fixes

Various Fixes

- Fixed an issue where attachments were not displaying for Notes in the data export.
- Fixed an issue with Calendar Sync sending unclear error messages for bad Graph API responses.
- Fixed an issue where students did not see staff profile pictures in the Student Scheduler.

Recruitment Management

General Enhancements

Prospect Quick Search

Navigate has added a Quick Search bar to Recruitment Management.

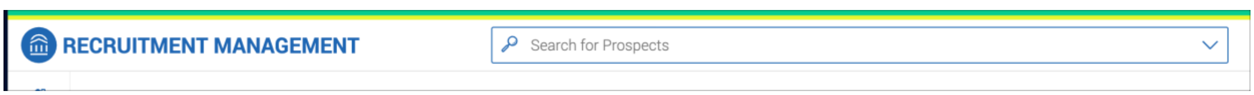


Figure 30. Quick Search bar for Recruitment Management

It works like the Quick Search in the main staff platform; however, it only shows prospects. Note that users need the View Prospects permission to see search results.

Updating Prospect Statuses via Reports and Student Lists

Users can now mass-update prospect statuses in Report Results and Student Lists.

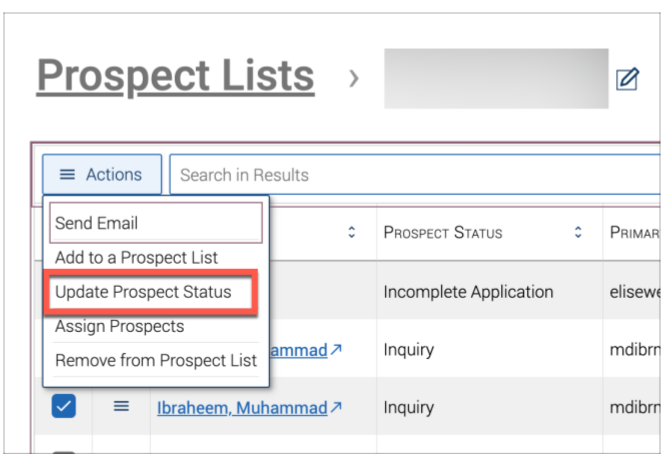


Figure 31. Updating Prospect Status from a list

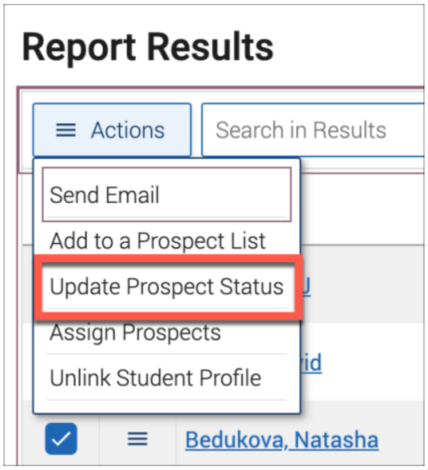


Figure 32. Updating prospect statuses from report results

Administration

Help with Default Field Mappings

When administrators are in Query, Submission, or Application Field Configurations, a new message appears at the top of the page explaining which fields must be mapped.

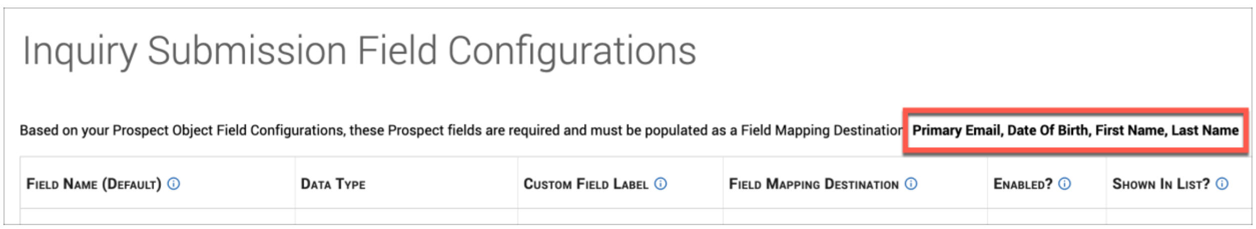


Figure 33. Warning message for admins about required default fields

Additionally, the fields that must be mapped are configured by default. If administrators adjust the mapping and a required field is not mapped, they will receive an error message.

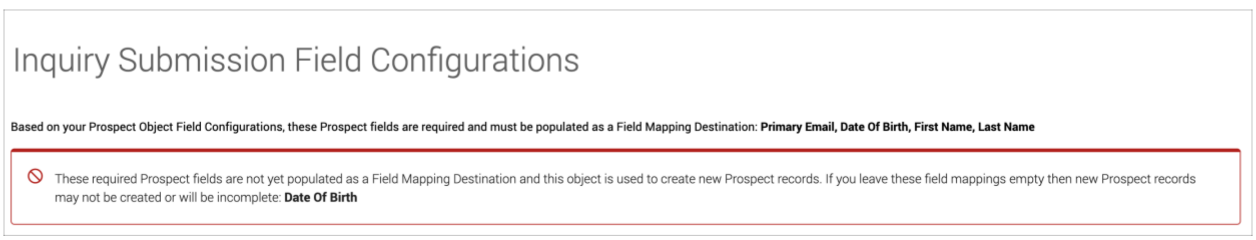


Figure 34. Message when a required field has not been mapped

Prospect Profiles

Document Actions Added to Interactions Feed

The Interactions feed now displays when a document has been added or updated to a prospect's profile.

Reports

Prospects Report Improvements

Recruitment Management has made several improvements to the Prospects Report.

First, we have added new fields to the filters:

- Last Activity Date
- Last Application Entry Term
- Last Application Status
- Last Application Submitted At
- Last Application Updated At
- Last Inquiry Submission Created On
- Last Note Created On

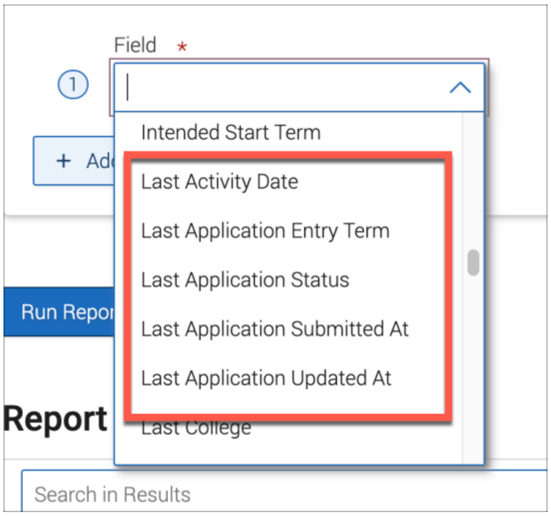


Figure 35. New fields in Prospects Report

The ability to use the conditions *Is Empty/Is Not Empty* is another new feature. This is available for many fields in Recruitment Management and V3 reports.

The new conditions and fields allow for new ways to search for prospect information. For example, a user can find prospects who has never had a note by searching on Last Note Created On and the condition Is Empty.

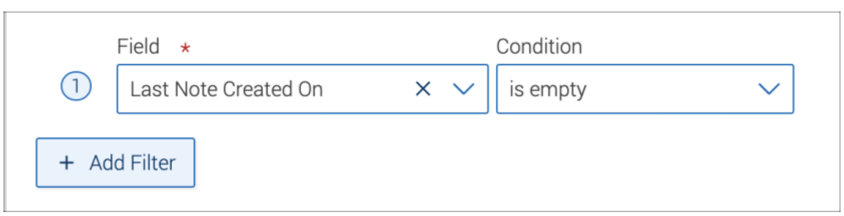


Figure 36. An example of using the Is Empty condition

The new fields mentioned above appear in the results of Prospects Report. They also appear in the Prospect Summary on the **Details** tab.

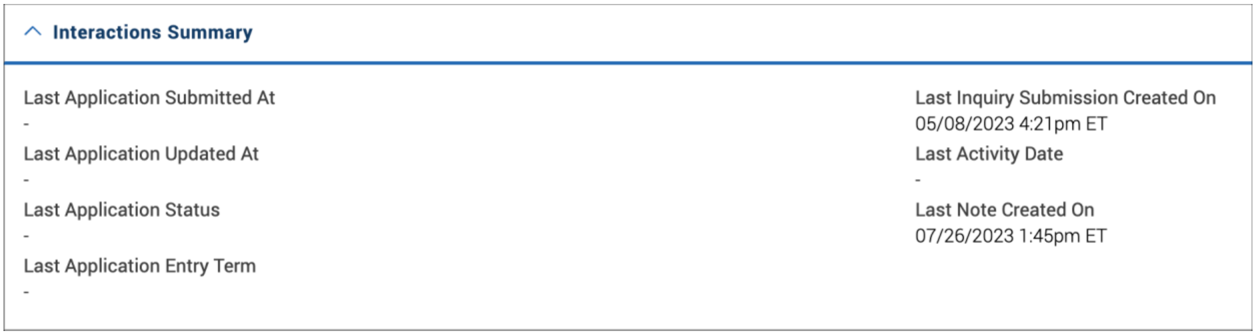


Figure 37. New fields on the Prospect Summary

For partners who are linking student profiles and prospect profiles, we have added the fields **Initial Enrollment Term** and **Initial Classification**. These fields allow your institutions to track a student from inquiry to enrollment in reporting. The fields are system-generated.

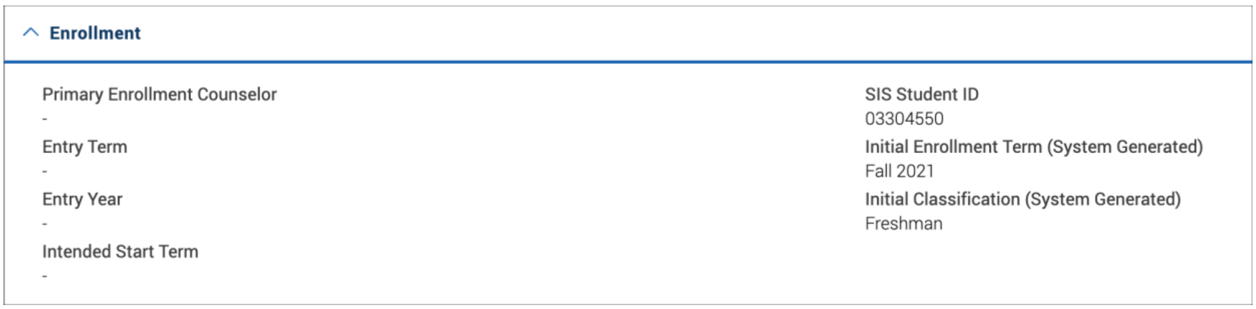


Figure 38. Enrollment-related fields on a prospect profile

Field Indicator Change in Recruitment Management Reports

If a field's possible values are *True/Yes, False/No*, or blank, users now see a Yes/No indicator rather than a check and an X in the field.

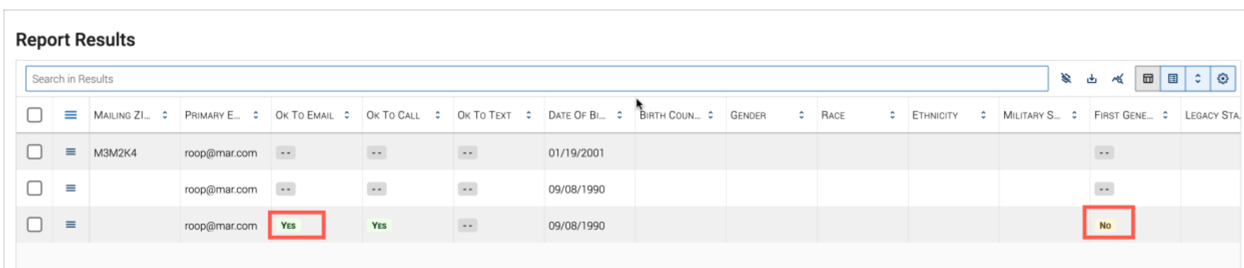


Figure 39. Report results with Yes/No field indicators

Fixes

Various Fixes

- Fixed an issue where after sending an email message, the dialog stayed open.
- Fixed an issue where an email would not send if even one prospect was not OK to email. Now, when this occurs, the email will send to the prospects who are OK to email without the error message.
- Users should no longer see a message that says a prospect has been deleted "complete with errors".
- Fixed an issue where a broken image was showing in an email footer.